

USF

Tampa

2012-13
Work Plan



University of South Florida - Tampa

Work Plan Presentation for 2012-13 Board of Governors Review

PENDING USF SYSTEM BOT APPROVAL



INTRODUCTION

The State University System of Florida has developed three tools that aid in guiding the System's future.

- 1) The Board of Governors' new Strategic Plan 2012-2025 is driven by goals and associated metrics that stake out where the System is headed;*
- 2) The Board's Annual Accountability Report provides yearly tracking for how the System is progressing toward its goals;*
- 3) Institutional Work Plans connect the two and create an opportunity for greater dialogue relative to how each institution contributes to the System's overall vision.*

These three documents assist the Board with strategic planning and with setting short-, mid- and long-term goals. They also enhance the System's commitment to accountability and driving improvements in three primary areas of focus: 1) academic quality, 2) operational efficiency; and, 3) return on investment.

The Board will use these documents to help advocate for all System institutions and foster even greater coordination with the institutions and their Boards of Trustees.

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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MISSION STATEMENT (What is your purpose?)

The University of South Florida's mission is to deliver competitive undergraduate, graduate and professional programs, to generate knowledge, to foster intellectual development, and to provide cutting-edge learning to ensure student success.

VISION STATEMENT (What do you aspire to?)

The University of South Florida envisions itself as a premier public research university with state, national and global impact, positioned for membership in the Association of American Universities.

USF is dedicated to: (i) Student success and access through a vibrant, interdisciplinary, and learner-centered environment; (ii) Research and scientific discovery to strengthen the economy, promote civic culture and the arts, and to design and build sustainable communities through the generation, dissemination, and translation of new knowledge across all academic and health-related disciplines; and (iii) Partnerships to build significant and integrated university-community collaborations through technological innovation, and sound scholarly and artistic activities.

STATEMENT OF STRATEGY (How will you get there?)

Given your mission, vision, strengths and available resources, provide a brief description of your market and your strategy for addressing and leading it.

USF is a RU/VH institution attracting students and faculty of the highest caliber. In moving forward towards AAU eligibility, USF measures its progress by setting clear annual targets for a series of metrics and compares itself to its peer and aspirational peer institutions. USF uses national benchmarks to monitor: Broad measures of academic institutions through the Integrated Postsecondary Education Data System (IPEDS); Its position in the top tier of American research universities through the Carnegie Foundation for the Advancement of Teaching, along with its designation as a *Community Engaged University*; Performance indices through the Association of American Universities' (AAU); Ranking of research universities through the National Science Foundation (NSF); Ranking of the scope and quality of graduate programs through the National Research Council (NRC); Ranking by the annual report of the Top American Research Universities (TARU); Annual ranking of National Universities US News and World Report's (USNWR); Technology transfers, start-ups and patents through the Association of University Technology Managers (AUTM); Endowment standings through the National Association of Colleges and University Business Officers (NACUBO); Statistics on international education and study abroad through the Institute of International Education/Open Doors (IIE); Moody's credit rating; and Annual giving through Voluntary Support of Education (CAE/VSE). These data are available in several web sites and show trends and comparisons for many of these metrics over the last ten years.

[Planning, Performance and Accountability Matrix](#)

[PDF of the Planning Metrics Matrix](#)

[Performance Dashboard](#)



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

What are your core capabilities, opportunities and challenges for improvement?

USF core capabilities include: Diversity; Excellence in teaching and learning; High impact scholarship, research and creative activities; Success and achievement of its students, faculty, staff and alumni; Shared governance; Collegiality, academic freedom, and professional responsibility; Entrepreneurial spirit, partnerships and innovation; Transparent accountability; Global research, community engagement and public service. The challenge will be to maintain institutional quality, increase educational and research productivity, and enhance revenue under dwindling state resources.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

Describe your top three key initiatives for the next three years that will drive improvement in Academic Quality, Operational Efficiency, and Return on Investment.

1 Well-educated global citizens through continuing commitment to student success: (a) Provide first-class, comprehensive educational programs and student research opportunities to foster critical thinking and intellectual inquiry; (b) Develop diverse, dynamic global citizens and leaders to strengthen communities, and promote human rights and social justice; (c) Enhance opportunities for students by providing transformational learning that is intellectually, scientifically and technologically sound and produces relevant, applied skills and engaged outcomes including an increased commitment to STEM and health fields; and (d) Educate competitive, highly-skilled students ready to enter the workforce.

To reach this goal, USF will: Recruit high quality students; promote diversity; Infuse global content into existing and new curricula; Increase study abroad and funding/scholarships; Attract global students; Partner with international organizations; Increase student research awards; Increase graduate programs especially in STEM and health-related disciplines; Increase experiential learning opportunities.

2 High-quality research and innovation with global applications to change lives, improve health, and foster sustainable development and positive societal change: (a) Engage in high impact research, scholarship and creative activities that generate new knowledge; (b) Increase research opportunities; (c) Develop strategic interdisciplinary research initiatives that solve critical problems; and (d) Promote community engaged scholarship and creative activities to benefit all members of society.

To reach this goal, USF will: Recruit and retain high quality faculty; build a sustainable research infrastructure; research and grant opportunities; provide training programs that increase the rate of successful funding from national agencies; employ emerging technologies to enhance research and engagement; increase corporate partnerships; promote health and technology innovation; strengthen collaborative partnerships with health, educational, allied science, and engineering entities.

3 A first-class, higher educational institution that drives Tampa Bay region's economic engine: (a) Demonstrate financial security via a sustainable economic base in all business practices; (b) Pursue entrepreneurial endeavors that augment revenue and maximize institutional effectiveness; (c) Establish mutually beneficial partnerships (internal and external) that enhance student access to academic programs, research and employment opportunities; and (d) Provide stewardship of a university that represents the cornerstone of economic and cultural significance for the community.

To reach this goal, we will: Define, inform and generate new efficient and effective budget practices; increase understanding and transparency of fiscal affairs and financial longevity; enhance institutional infrastructure by securing mutually beneficial partnerships. market the USF brand via strategic dissemination of information; increase revenue generating patents; establish USF as a community fostering partnerships, employment, k-12 schools, residential opportunities and alumni engagement.



KEY PERFORMANCE INDICATORS

The Board of Governors has selected the following Key Performance Indicators, from its 2012-2025 System Strategic Plan and from accountability metrics identified by the Florida Legislature. The Key Performance Indicators emphasize three primary areas of focus: **Academic Quality, Operational Efficiency, and Return on Investment**. The indicators address common goals across all universities while also providing flexibility to address institution-specific goals from a list of metrics in the 2012-2025 System Strategic Plan.

The Goals Specific to Research Universities apply only to those universities classified by the Carnegie Foundation for the Advancement of Teaching as being a 'Research University'¹, which includes Florida A&M University (by university request), Florida Atlantic University, Florida International University, Florida State University, University of Central Florida, University of Florida, and the University of South Florida.

¹ The Carnegie Foundation for the Advancement of Teaching has developed a well-respected system of categorizing postsecondary institutions that includes consideration of each doctorate-granting university's research activities – for more information see [link](#).



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
USF will (a) Engage in high impact student success research; (b) Establish partnerships to enhance student access to academic programs, and research; and (c) Educate competitive, highly-skilled (STEM) students ready to enter the workforce. Investment in STEM and ranked programs will continue.					
Avg. SAT Score	-1% ¹	1136	1162	1170	1180
Avg. High School GPA (on 4.0 scale)	5%	3.68	3.81	3.83	3.85
Professional/Licensure Exam					
First-time Pass Rates ²					
Exams Above National/State Benchmark	n/a	3	3	4	4
Exams Below National/State Benchmark	n/a	2	2	1	1
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	1	2	4	2	
Operational Efficiency					
Freshman Retention Rate	6%	88.3%	88.5%	89%	90%
FTIC Graduation Rates					
In 4 years (or less)	14%	34.8%	35%	36%	38%
In 6 years (or less)	7%	50.9%	52%	52%	54%
AA Transfer Graduation Rates					
In 2 years (or less)	1%	27.9%	28%	29%	30%
In 4 years (or less)	5%	62.1%	62.5%	63%	64%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	5	6	5	6	
Return on Investment					
Bachelor's Degrees Awarded	36%	6,842	7,192	7,250	7,350
Percent of Bachelor's Degrees in STEM	2%	22.7%	23.9%	24.5%	25.8%
Graduate Degrees Awarded	35%	2,715	2,845	2,900	3,000
Percent of Graduate Degrees in STEM	1%	23%	22%	21%	23%
Percent of Baccalaureate Graduates Employed in Florida	n/a	Data available only at the USF System level			
Percent of Baccalaureate Graduates Continuing their Education (in FL)	n/a	Data available only at the USF System level			
Annual Gifts Received (\$M)	n/a	Data available only at the USF System level			
Endowment (\$M)	n/a	Data available only at the USF System level			
SUBTOTAL OF IMPROVING METRICS	4	3	1	4	
TOTAL OF IMPROVING METRICS	10	11	10	12	

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
Faculty Awards	20%	6 est	10	12	14
National Academy Members	50%	3	3	4	5
Number of Post-Doctoral Appointees	64%	293	310	312	320
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures (based on 8 broad discipline areas, and includes private universities)	n/a	Data available only at the USF System level			
SUBTOTAL OF IMPROVING METRICS	3		2	3	3
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) (includes non-Science & Engineering disciplines)	n/a	\$ 394.9	\$ 414.7	\$ 435.4	\$ 457.2
Science & Engineering Research Expenditures (\$M)	20%	\$ 343.0	\$ 360.2	\$ 378.2	\$ 397.1
Percent of Research Expenditures funded from External Sources	n/a	77.76%	81.65%	85.73%	90.02%
Patents Issued	279%	91	84	67	50
Licenses/Options Executed	71%	36	37	40	48
Licensing Income Received (\$M)	-24%	\$ 1.3	\$ 1.3	\$ 2.5	\$ 2.75
Number of Start-up Companies	33%	8	5	7	8
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences	24%	\$136.0	\$142.8	\$149.9	\$157.4
National Rank is Higher than Predicted by the Financial Resources Ranking (based on U.S. News & World Report)	n/a	181-173	n/a	n/a	n/a
Research Doctoral Degrees Awarded	44%	267	277	283	340
Professional Doctoral Degrees Awarded	30%	156	156	158	165
SUBTOTAL OF IMPROVING METRICS	x		6	10	11
TOTAL OF IMPROVING METRICS	x		8	13	14

Notes: (1) the most recent faculty Awards data is based on 2009-10 data.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Graduate Degrees in Areas of Strategic Emphasis	35%	1225	1250	1275	1350
Freshman in Top 10% of Graduating High School Class	13%	23%	24%	24.5%	25.5%
Percent of Course Sections Offered via Distance and Blended Learning	11%	11.5%	12.5%	13.5%	14.5%

To further distinguish the university's distinctive mission, the university may choose to provide two additional narrative and metric goals that are based on the university's own strategic plan.

Goal 1. As an RU/VH institution, with a strategic goal of engaging in high impact research, USF will continue to build a sustainable research infrastructure, including total research expenditures as defined by the National Science Foundation.

Total Research Expenditures	n/a	\$ 394.9	\$ 414.7	\$ 435.4	\$ 457.2
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Goal 2. As an RU/VH institution, with a strategic goal of engaging in high impact research, USF will continue to build a sustainable research infrastructure, including federal research expenditures as defined by the National Science Foundation.

Federal Research Expenditures	n/a	\$243	\$255.2	\$267.9	\$281.3
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OPERATIONS

Draft



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 253.88	\$ 239.02	\$ 218.00	\$ 217.61	\$ 181.80	\$ 151.52*
Tuition	\$ 93.43	\$ 95.74	\$ 103.95	\$ 118.18	\$ 133.35	n/a
TOTAL MAIN OPERATIONS	\$ 347.30	\$ 334.76	\$ 321.95	\$ 335.80	\$ 315.15	\$ 151.52*
Education & General – Health-Science Center / Medical Schools						
State Funds	\$66.7	\$ 62.8	\$ 66.6	\$ 68.3	\$ 64.8	\$65.2*
Tuition	\$ 22.6	\$ 26.3	\$ 30.0	\$ 32.9	\$ 34.5	n/a
TOTAL HSC	\$ 89.3	\$ 89.1	\$ 96.6	\$ 101.2	\$ 99.3	\$ 65.2*
EDUCATION & GENERAL TOTAL REVENUES	\$ 436.60	\$ 423.86	\$ 418.55	\$ 437.00	\$ 414.45	\$ 216.72*

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

*Per SB1994, the 2012-13 appropriations state funds amount includes the \$10M funding amount and \$6M for Pharmacy

OTHER BUDGET ENTITIES

Auxiliary Enterprises

Resources associated with auxiliary units that are self-supporting through fees, payments and charges. Examples include housing, food services, bookstores, parking services, health centers.

Revenues Data are reported at the USF System level

Contracts & Grants

Resources received from federal, state or private sources for the purposes of conducting research and public service activities.

Revenues Data are reported at the USF System level

Local Funds

Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, intercollegiate athletics, technology fee, green fee, and student life & services fee.

Revenues Data are reported at the USF System level

Faculty Practice Plans

Revenues/receipts are funds generated from faculty practice plan activities.

Revenues Data are reported at the USF System level

OTHER BUDGET ENTITY TOTAL REVENUES

Data are reported at the USF System level

UNIVERSITY REVENUES GRAND TOTAL

Data are reported at the USF System level



FISCAL INFORMATION (continued)

Undergraduate Resident Tuition Summary *(for 30 credit hours)*

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$660	\$960	\$1,569	\$2,269	\$3,074
Percent Increase	15%	15%	15%	15%	15%
Required Fees¹	\$1,668	\$1,746	\$1,768	\$1,768	\$1,768
TOTAL TUITION AND FEES	\$5,198	\$5,806	\$6,437	\$7,137	\$7,942

Note 1: For more information regarding required fees see list of per credit hour fees and block fees on page 16.

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	53%	52%	52%	53%	53%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$18,517	\$19,963	\$21,811	\$21,784	\$21,784
Student Loan Cohort Default Rate (2nd Year)	4.9%	6.3%	7.0%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	xx%	xx%	10.1%	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,800	\$1,500	\$9,190	\$1,600	\$2,500	\$20,590
AT HOME	\$5,800	\$1,500	\$4,590	\$1,600	\$2,500	\$15,990

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	6,650	38%	\$11,495	-\$3,009	\$8,429	\$4,219
\$40,000-\$59,999	2,243	13%	\$13,822	-\$419	\$5,909	\$4,106
\$60,000-\$79,999	1,774	10%	\$15,771	\$1,740	\$3,801	\$4,323
\$80,000-\$99,999	1,477	8%	\$16,632	\$2,633	\$2,911	\$4,094
\$100,000 Above	4,301	24%	\$16,617	\$2,590	\$2,977	\$2,913
Missing	1,156	7%	\$17,853	\$4,656	\$815	\$219
TOTAL	17,601	100%	AVERAGE \$14,323	\$145	\$5,346	\$3,623

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 2012
Implementation Date (month/year):	August 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire university
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All university undergraduate courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$52.29
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$20.29
\$ Increase in tuition differential for 30 credit hours:	\$608.70
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected) :	\$14,039,416
Total differential fee revenue generated in 2012-13 (projected):	\$29,831,109
Intended Uses	
<p>Cost-efficient utilization of instructional technology and innovation , along with investments in faculty and professional staff to enhance timely college completion rates, attainment and career placement through activities such as:</p> <ul style="list-style-type: none"> Technology & Research: Provide supplemental instruction and expanded undergraduate research opportunities through high-impact student success initiatives (e.g., the development of a Science Math and Research Technology SMART Lab, instructional and learning innovation) and distance learning for expanded access. Financial Counseling and Debt Reduction: Mitigate the financial impact of the increasing costs of higher education through focused and proactive financial counseling and debt reduction strategies. Advising: Enhance the current advising model through technology and staffing, with a focus on goal setting, time-to-degree, improved graduation rates, reducing excess hours, and expanding USF's Veterans' Success program. Job Placement –Economic development: Broaden the high skilled workforce and direct economic impact of the university by: expanding STEM and IT programs, strengthening relationships with business and industry, engaging in co-op partnerships, and expanding professional support for job placement through USF's recently expanded Career Center/Job Hub. 	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>USF System efforts to move away from the traditional delivery model will be significantly impaired or delayed, potentially resulting in stagnant or declining graduation rates and a reduced ability to meet the workforce demands of the state. The loss of potential need-based financial aid (30%) will further reduce student access, retention and graduation rates while likely increasing student indebtedness. USF's commitment to investing in (70%) enhanced instruction and learning (particularly in STEM), serving returning veterans, reducing excess hours and student debt, and job placement for graduates will be diminished or, at best, delayed.</p>	
Request to Modify or Waive Tuition Differential Uses	
<p>(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))</p>	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Improve Baccalaureate retention and graduation	<ul style="list-style-type: none"> Retained faculty Strengthened student advising system by hiring and retaining advisors Maintained course offerings for students
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	46 faculty equivalents hired or retained
Total Number of Advisors Hired or Retained (funded by tuition differential):	40 advisors hired or retained
Total Number of Course Sections Added or Saved (funded by tuition differential):	184 sections saved
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Increase the number of students who are awarded grants funded by the tuition differential.	The number of students supported increased to 6,116 (an increase of 2,860 students, or 87.8%)
Increase the average amount of awards in order to partially off-set tuition increases for needy students.	The average award increased by \$137, which represents an increase of 11.5%.
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	6,116
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	1,324
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	100
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	2,500



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential

Budget Entity: 48900100 (Educational & General)

SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)

	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
<u>FTE Positions:</u>		
Faculty	46.0	123.0
Advisors	40.0	51.0
Staff		-
Total FTE Positions:	86.0	174.0
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ -	\$ -
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ -	\$ -
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$ 18,218,939	29,831,109
Interest Revenue - Current Year	31,992	52,384
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$ 18,250,931	\$ 29,883,493
<u>Expenditures</u>		
Salaries & Benefits	\$ 12,775,651	\$ 20,918,443
Other Personal Services	-	-
Expenses	-	-
Operating Capital Outlay	-	-
Student Financial Assistance	5,475,280	8,965,050
Expended From Carryforward Balance	-	-
**Other Category Expenditures	-	-
Total Expenditures:	\$ 18,250,931	\$ 29,883,493
Ending Balance Available:	\$ -	\$ -

*Since the 2011-12 year has not been completed, provide an estimated actual.

**Provide details for "Other Categories" used.



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

University of South Florida - Main Campus							
<u>Undergraduate Students</u>	<u>Actual</u>			<u>Projected</u>			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% projected legislative increase)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	\$13.74	\$22.00	\$32.00	\$52.29	\$75.63	\$102.47	\$133.33
Total Base Tuition and Differential	\$102.33	\$117.67	\$135.32	\$155.61	\$178.95	\$205.79	\$236.65
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76
Activity & Service	\$9.31	\$11.28	\$11.28	\$11.71	\$11.71	\$11.71	\$11.71
Health	\$8.60	\$9.30	\$9.73	\$9.73	\$9.73	\$9.73	\$9.73
Athletic	\$11.76	\$13.73	\$14.15	\$14.46	\$14.46	\$14.46	\$14.46
Transportation Access	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Other (list): Marshall Center	\$1.50	\$1.50	\$1.50	\$1.50	\$1.50	\$1.50	\$1.50
Student Green Energy			\$1.00	\$1.00	\$1.00	\$1.00	\$1.00
Academic Enrichment and Opportunity							
Sub total (credit hour fees)	\$47.77	\$53.13	\$55.74	\$58.48	\$58.48	\$58.48	\$58.48
Total Tuition and Fees per credit hour	\$150.10	\$170.80	\$191.06	\$214.09	\$237.43	\$264.27	\$295.13
% Change		13.8%	11.9%	12.1%	10.9%	11.3%	11.7%
Fees (block per term):							
Activity & Service	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00
Health							
Athletic	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00
Transportation Access							
Other (list): Marshall Center	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
Total Block Fees per term	\$37.00	\$37.00	\$37.00	\$37.00	\$37.00	\$37.00	\$37.00
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$3,069.90	\$3,530.10	\$4,059.60	\$4,668.30	\$5,368.50	\$6,173.70	\$7,099.50
Total Fees for 30 Credit Hours	\$1,507.10	\$1,667.90	\$1,746.20	\$1,828.40	\$1,828.40	\$1,828.40	\$1,828.40
Total Tuition and Fees for 30 Credit Hours	\$4,577.00	\$5,198.00	\$5,805.80	\$6,496.70	\$7,196.90	\$8,002.10	\$8,927.90
\$ Change		\$621.00	\$607.80	\$690.90	\$700.20	\$805.20	\$925.80
% Change		13.6%	11.7%	11.9%	10.8%	11.2%	11.6%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$343.16	\$343.16	\$291.68	\$315.00	\$315.00	\$315.00	\$315.00
Percentage change			-15.0%				
Out-of-State Undergraduate Student Financial Aid ³	\$17.15	\$17.15	\$14.58	\$15.75	\$15.75	\$15.75	\$15.75
Total per credit hour	\$360.31	\$360.31	\$306.26	\$330.75	\$330.75	\$330.75	\$330.75
% Change		0%	0%	8%	0%	0%	0%
Total Tuition for 30 Credit Hours	\$3,069.90	\$3,530.10	\$4,059.60	\$4,668.30	\$5,368.50	\$6,173.70	\$7,099.50
Total Fees for 30 Credit Hours	\$12,316.40	\$12,477.20	\$10,934.00	\$11,750.90	\$11,750.90	\$11,750.90	\$11,750.90
Total Tuition and Fees for 30 Credit Hours	\$15,386.30	\$16,007.30	\$14,993.60	\$16,419.20	\$17,119.40	\$17,924.60	\$18,850.40
\$ Change		\$460.20	\$529.50	\$1,425.60	\$700.20	\$805.20	\$925.80
% Change		4.0%	-6.3%	9.5%	4.3%	4.7%	5.2%
Housing/Dining	\$8,750.00	\$9,000.00	\$9,360.00	\$9,360.00	\$9,360.00	\$9,360.00	\$9,360.00
% Change		2.9%	4.0%	0.0%	0.0%	0.0%	0.0%

¹ can be no more than 5% of tuition.² capped in statute.



Draft



ENROLLMENT PLANNING

Planned Growth by Student Type *(for E&G students at all campuses)*

	5 YEAR TREND <i>(2005-06 to 2010-11)</i>	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR <i>(2014-15)</i> PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	1%	16,226	54%	16,000	52%	15,600	52%	15,100	51%
FTIC (Profile Admit)	-60%	218	1%	200	1%	200	1%	200	1%
AA Transfers*	31%	9,518	30%	9,125	29%	8,725	29%	8,550	29%
Other Transfers	-2%	5,363	17%	5,575	18%	5,375	18%	5,500	19%
Subtotal	6%	31,325	100%	30,900	100%	29,900	100%	29,350	100%
GRADUATE STUDENTS									
Master's	20%	5,935	67%	6,050	66%	6,200	65%	6,350	64%
Research Doctoral	23%	2,289	26%	2,425	26%	2,600	27%	2,750	28%
Professional Doctoral	24%	604	7%	700	8%	750	8%	750	8%
Subtotal	21%	8,828	100%	9,175	100%	9,550	100%	9,850	100%
NOT-DEGREE SEEKING	-5%	1,693		1,524		1,650		1,800	
MEDICAL	%Δ	473		480		480		480	
TOTAL	%Δ	42,319		42,079		41,580		41,480	

Note*: AA transfers refer only to transfers from the Florida College System.

Planned Growth by Method of Instruction *(for E&G students at all campuses)*

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL FTE		2012-13 PLANNED FTE		2013-14 PLANNED FTE		3 YEAR (2014-15) PLANNED FTE	
		% of TOTAL		% of TOTAL		% of TOTAL		% of TOTAL	
UNDERGRADUATE									
DISTANCE (>80%)	17%		3,555	18%	3733	18%	3920	18%	4116
HYBRID (50%-79%)	0%		322	2%	338	2%	355	2%	373
TRADITIONAL (<50%)	83%		16260	81%	17073	81%	17927	81%	18823
TOTAL	100%		20,137	100%	21,144	100%	22,201	100%	23,312
GRADUATE									
DISTANCE (80%)	19%		980	19%	1029	19%	1080	19%	1134
HYBRID (50%-79%)	0%		107	2%	112	2%	118	2%	124
TRADITIONAL (<50%)	81%		4016	79%	4217	79%	4428	79%	4649
TOTAL	100%		5,102	100%	5,358	100%	5,626	100%	5,907

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. **Distance Learning** is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). **Hybrid** is a course where 50% to 79% of the instruction is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per SUDS data element 2052). **Traditional (and Technology Enhanced)** refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for *no more* than 49% of instruction (per SUDS data element 2052).



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	8617	7763	8617	7651	7592	7586	7747	0.3%
UPPER DIVISION	9999	10070	9999	10662	10416	10244	10351	-0.74%
GRAD I	2672	2211	2672	2212	2179	2166	2216	0.05%
GRAD II	623	807	623	751	763	778	821	2%
TOTAL	21911	20851	21911	20,522	20,512	20,609	21,135	-0.17%
Not a Florida Resident								
LOWER DIVISION	0	349	0	522	606	709	995	17%
UPPER DIVISION	0	344	0	452	491	537	647	10%
GRAD I	0	310	0	410	440	473	547	8%
GRAD II	0	437	0	519	545	572	630	5%
TOTAL	1302	1439	1302	1902	2082	2291	2820	11%
Total								
LOWER DIVISION	8617	8112	8617	8173	8198	8295	8742	2%
UPPER DIVISION	9999	10414	9999	11114	10907	10781	10998	-0.3%
GRAD I	2672	2521	2672	2621	2620	2639	2763	1%
GRAD II	623	1244	623	1270	1307	1350	1452	3%
TOTAL	23,213	22,290	23,213	23,179	23,031	23,065	23,955	1%
TOTAL (US FTE)	30,950	29,720	30,950	30,897	30,701	30,745	31,932	%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts (FTE does not apply)

Medicine Headcounts								
FLORIDA RESIDENT	480	445	480	436	432	432	432	-0.18%
NON-RESIDENT	0	32	0	44	48	48	48	1.76%
TOTAL	480	477	480	480	480	480	480	0.00%



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT in 5th year	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
B.A. Film and New Media Studies (Tampa)	50.0602	No	FSU,UF,UNF,UWF,UCF, FIU,FAU		117	May 2013
<i>*Program has not completed internal approval process</i>						
<i>**Substitution for B.S. Digital Design & Tech.</i>						

MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS

Sports & Entertainment Mgt (Tampa)	31.0504	No	FAMU,FAU,FIU,FSU, UCF,UF	N	25	May 2013
Athletic Training (Tampa)	51.0913	No	FIU	N	30	May 2013
Metabolic & Nutritional Medicine (Tampa)	26.9999	STEM	None	N/Y	37.5	May 2013
<i>*Program has not completed internal review process</i>						

New Programs To Be Considered by University in 2013-15 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT in 5th year	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Diplomacy and Strategic Studies	30.2011	No	FIU	Partial	35	August 2015
Physician Assistant	51.0912	STEM	UF	N	50	August 2014
DOCTORAL PROGRAMS						
Cell and Molecular Biology	26.0400	STEM	UF	N	40	August 2014
Integrative Biology	26.1399	STEM	UF, UCF	N	40	August 2014
Rehabilitation Sciences	51.2314	STEM	UF	Partial	20	August 2015
Translational Neurosciences	26.0608	STEM	None	Partial	20	August 2015



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 <i>minus</i> table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

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